**BUSINESS INFORMATION**

Company Name and Corporate Structure (LLC, B-Corp, C-Corp, etc.):

Company Category:

- Population Health
- Clinical Decision Support
- Medical Device
- Big Data/Analytics
- Personalized Medicine/Precision Medicine
- Telemedicine
- Patient Education/Self-Care
- EHR Interoperability
- Other

Company Size and Stage of Development:

Current Number of Customers:

Current State of Financial Viability:

In a few sentences, describe your company and your main value proposition:

What differentiates you from your competitors?

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INFORMATION TECHNOLOGY

Does your product directly integrate with our EHR or do we need to copy/paste patient information from your dashboard to our EHR? If we have the option, how much more does EHR integration cost?

What changes will I need to make to my health IT network to accommodate software or hardware to support your service?

In a few sentences, walk us through your process of integrating with organizations’ existing technology (EHR, PACS, etc.).

What types of customization features exist?

Do patients have access to their personal data?

- Yes
- No

How do you manage connectivity issues? What backup plans are in place should we experience a connectivity issue/downtime?
DATA SECURITY/PRIVACY

Please provide documentation of:

- HIPAA and HITECH compliance
- Any possible third-party audits, including SOC 2 or HITRUST
- Results of penetration testing

How will your product keep my patients’ information private—both in my office and at the patients’ home?

How will your product ensure that my patients’ information is securely transmitted?

How does your service manage user authentication and authorization?

What privacy and security safeguards are included with your service, i.e., cloud-hosted services? (Note that privacy and security safeguards are required by HIPAA.)

What process do you have in place to mitigate cyberthreats, i.e., attacks on the software your products run on?

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DATA SECURITY/PRIVACY (CONT.)

What process is in place for updates, security patches, and ongoing maintenance?

Does your product or service utilize hardware or software that is considered a medical device by the Food and Drug Administration (FDA)?

How do you manage device cybersecurity?

If my patients have privacy and security questions who should they contact?

Who else will have access to my patients’ data? Is it collected and/or shared in a hub or repository?

What process is available to export patient data if I choose to discontinue using your digital health technology service?

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CUSTOMER SERVICE

Please select which of the following services you provide:

- Pre-launch support
- Staff training
- Staff support
- Patient training
- Patient support
- Data analysis

Help us understand what each of these services specifically entail.

Do any of these services cost extra beyond a basic package? If so, which services?

Please provide 1–3 references of current users we can contact to learn more about your customer service.
USABILITY

In a few sentences, please describe how you verify device and data accuracy.

In what form would we receive your data in (e.g., raw data, out-of-parameter alerts, treatment recommendations)?

If applicable, can your program be run on any device or is it device-specific?

- [ ] Software is device-specific
- [ ] Software can be run on multiple devices

Please list devices:

We will need to test the front- and back-end user experience with our internal team. Are you able to provide a demo for our team?

- [ ] No
- [ ] Yes

Please list who to contact to set up a demo:
**EFFICACY**

Describe the significant problem your company is trying to address.

How does your product or service address the problem?

Please provide 1–3 case studies demonstrating results either below or in an attachment.

Our goal is to (insert your specific goal(s)),

which we’re measuring by (insert key measurement(s)).

How will your company help deliver on our goal(s)?

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APPENDIX D.2: EVALUATING THE VENDOR

Vendor Information Intake Form (Cont.)

Is there any additional information you would like to provide that is not already included in this form?

Please submit any supporting documentation that you feel would be beneficial (Executive Summary, Pitch Deck, Company Website, Demo Video)